System for Award Management (SAM)

► **Agency Roles Administrator Training**

► **Dial in information:**

888-426-6840 / passcode: 56808499#

July 10th, 2012

Agenda

► **SAM Update**

► **Today and the Future**

► **Your Role in SAM**

► **Federal Government Hierarchy**

► **Federal Government Roles**

► **Demo**
  - **Accessing SAM**
  - **Invitations**
  - **Approving Role Requests**
  - **Managing Users**

► **Questions**

What Is Our Improvement Approach?

Today

► **Siloed** – **Separate systems, each with a separate login**

► **Redundant** – **Overlapping data creates opportunity for error and complicates changes**

► **Separate** – **Multiple vendors at many hosting locations, managed separately with varying levels of service**
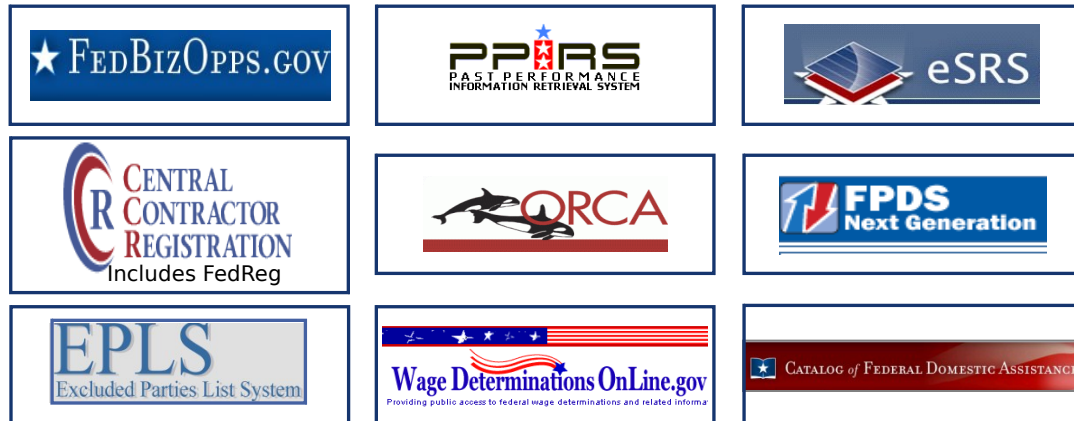
Future

► **1 Login!** – **Functionality accessible at one online location to streamline the process**

► **1 Data Source!** – **Centralized, normalized data to eliminate potential for conflicting values and improves agility to deal with future changes**

► **1 Host!** – **Consolidated hosting to reduce O&M costs**

Existing capabilities, streamlined for efficiency.
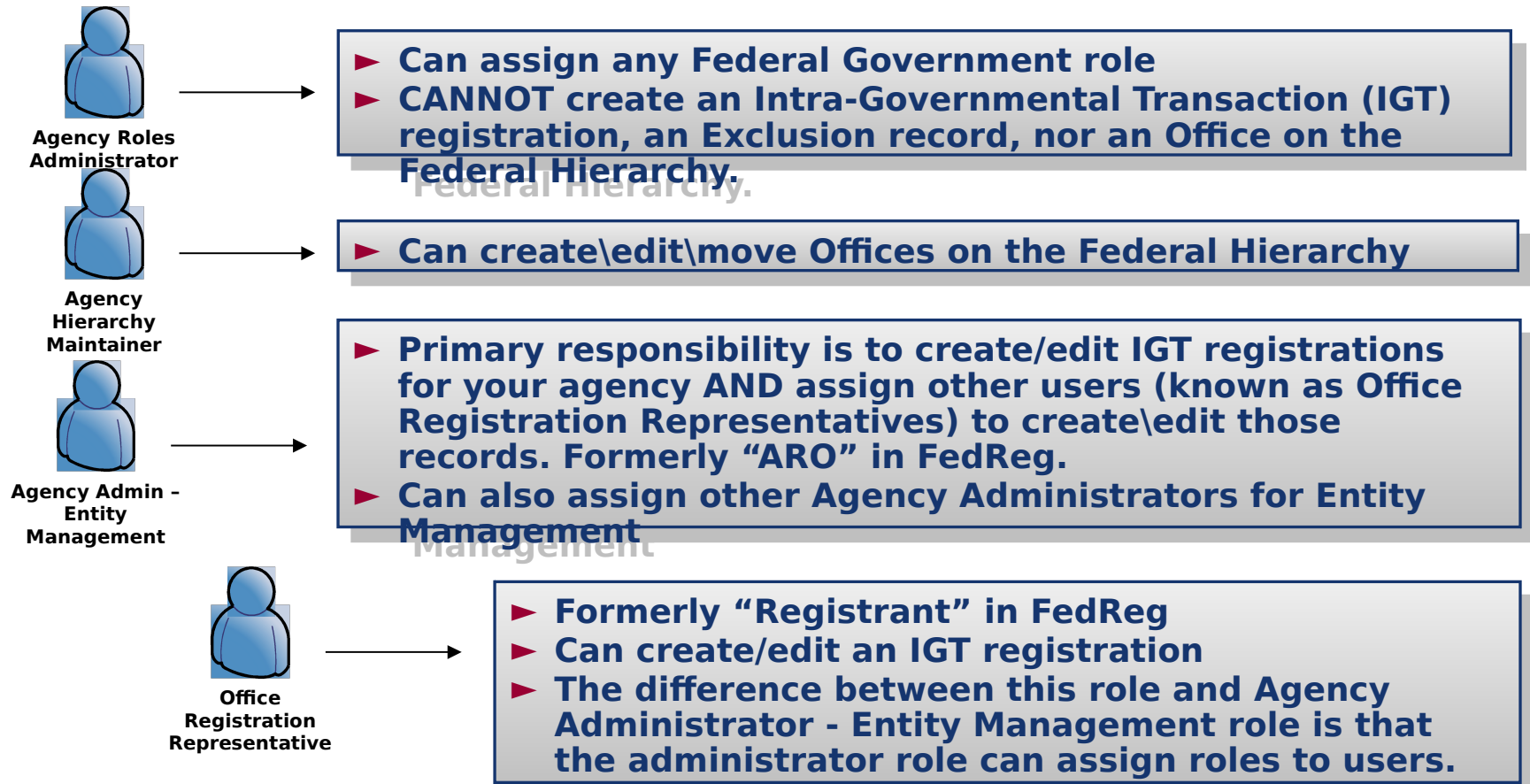
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SAM Access: What Do You Need To Know?

► **Existing CCR/FedReg, ORCA, and EPLS information will be migrated to SAM**

► **Once SAM Phase 1 goes live, you will be automatically redirected from CCR/FedReg, ORCA, and EPLS web sites to http://sam.gov**

► **Publicly available data will still be publicly available**

► **Anyone can create a SAM account. Those of you at this training will receive an invitation from SAM to create an account.**

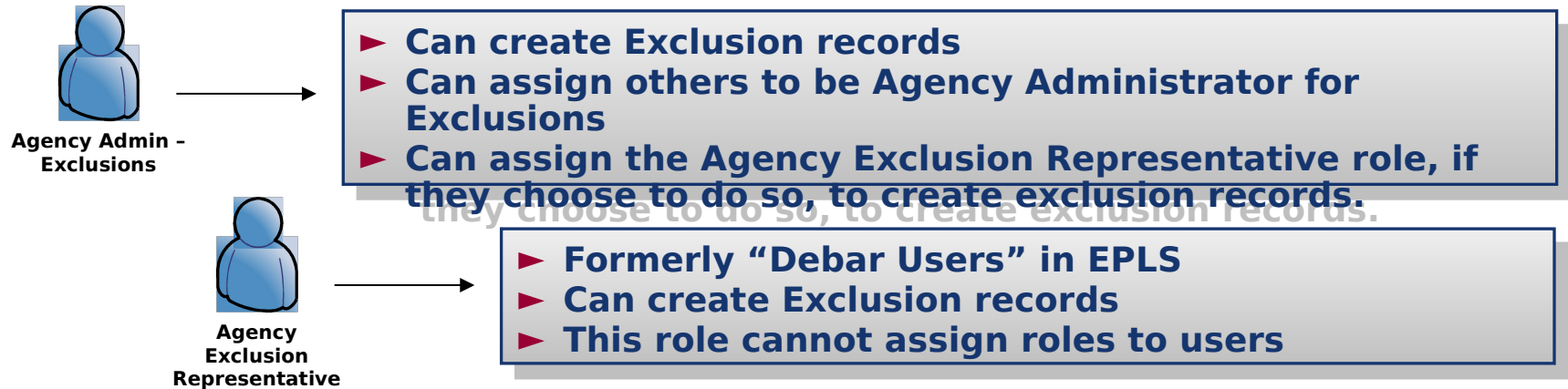► **This presentation covers what you can do as an Agency Roles Administrator in SAM**

Your Role in SAM

► **You are the Agency Roles Administrator for your department/agency**

► **Your primary duty is to manage the users who have roles with your department/agency**
  ▪ **You can invite users**
  ▪ **Approve role requests**
  ▪ **Grant additional roles**
  ▪ **Remove a user's roles**

► **PLEASE NOTE: It is up to you and your agency to determine the policy\process your agency wants to use in user role assignment. Do you want to allow users to request a role from you? SAM can do that. Do you, as the Agency Roles Administrator, just want to provide roles to new users without allowing the user to request anything? You can establish your own processes.**

► **You can assign any SAM Federal Government role within your department/agency**

► **You are not expected to manage roles for all users in your department/agency unless you want to. You can assign other administrators to also manage users.**

Federal Government Hierarchy

► **You assign roles to users at different levels of your hierarchy**

► **SAM's Federal Government hierarchy is based on the FPDS hierarchy, which contains seven levels**

  ▪ **Department**
  ▪ **Agency**
  ▪ **Major Command (DoD Only)**
  ▪ **Subcommand 1 (DoD Only)**
  ▪ **Subcommand 2 (DoD Only)**
  ▪ **Subcommand 3 (DoD Only)**
  ▪ **Office**

► **Federal entities in CCR, FedReg, and EPLS were mapped to this hierarchy**
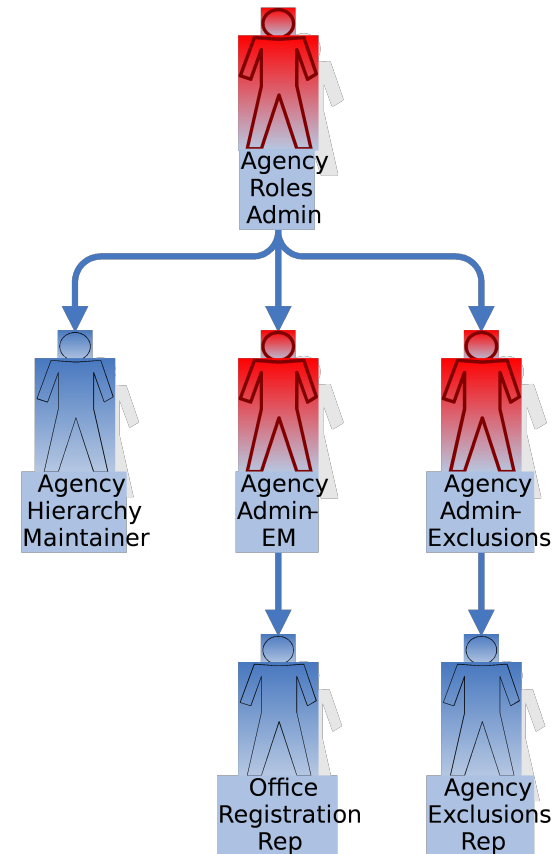
Federal Government Roles Summary

► **Federal Government roles are listed below. As the Agency Roles Administrator you can assign other users these roles or you can assign them to yourself.**

Agency Roles Administrator

► **Can assign any Federal Government role**
► **CANNOT create an Intra-Governmental Transaction (IGT) registration, an Exclusion record, nor an Office on the Federal Hierarchy.**

Agency Hierarchy Maintainer

► **Can create\edit\move Offices on the Federal Hierarchy**

Agency Admin – Entity Management

► **Primary responsibility is to create/edit IGT registrations for your agency AND assign other users (known as Office Registration Representatives) to create\edit those records. Formerly "ARO" in FedReg.**
► **Can also assign other Agency Administrators for Entity Management**

Office Registration Representative

► **Formerly "Registrant" in FedReg**
► **Can create/edit an IGT registration**
► **The difference between this role and Agency Administrator - Entity Management role is that the administrator role can assign roles to users.**

Agency Admin – Exclusions

- ► **Can create Exclusion records**
- ► **Can assign others to be Agency Administrator for Exclusions**
- ► **Can assign the Agency Exclusion Representative role, if they choose to do so, to create exclusion records.**

Agency Exclusion Representative

- ► **Formerly "Debar Users" in EPLS**
- ► **Can create Exclusion records**
- ► **This role cannot assign roles to users**

► **You do not need to assign every role. At a minimum you must assign an Agency Hierarchy Maintainer, Agency Administrator for Entity Management, and an Agency Administration for Exclusions. If you wish, you can assign the roles to yourself.**

- ▪ **The Agency Administrator for Entity Management can perform all the actions that an Office Registration Representative can perform so you do not need to assign an Office Registration Representative**

- ▪ **The Agency Administrator for Exclusions can perform all the actions that an Agency Exclusion Representative can perform so you do not need to assign an Agency**

Government Administrators

► **There are three types of Administrators, and each manages a specific set of roles**

  ▪ **Agency Roles Administrator**
    – Can assign all roles but CANNOT create an IGT registration, an Exclusion record, nor an Office

  ▪ **Agency Administrator – Entity Management**
    – Can assign others to also be Agency Administrator – Entity Management
    – Can assign Office Registration Representative role if they wish to do so
    – Can create/edit and IGT registration.
    – Can perform the same actions that the Office Registration Representative can do

  ▪ **Agency Administrator – Exclusions**
    – Can assign others to also be Agency Administrator – Exclusions
    – Can assign Agency Exclusions Representative role if they wish to do so
    – Can create Exclusion records
    – Can perform the same actions that the Office Registration Representative can do

► **In the diagram on the right, Administrators are listed in red**

► **Administrators can assign additional people to their own role and can assign any role listed underneath them**

► **Administrators manage users at their entity and any level below them**

Agency Roles Admin

Agency Hierarchy Maintainer

Agency Admin- EM

Agency Admin- Exclusions

Office Registration Rep

Agency Exclusions Rep

Getting Access

- ► **At Go-Live you will receive an invitation email from SAM**
  - ▪ **Only those who have been identified as an Agency Roles Administrator will receive an invitation**
- ► **Follow the link in the email and create your account in SAM**
- ► **When you finish the account creation process, your role will be active**
- ► **DEMO: Accepting Invitation**

Questions?

- ► **Questions?**

- ► **Continue to stay informed**
  - ▪ **Go to SAM.gov for additional training / information on SAM**

- ► **Please continue to submit your questions and ideas:**
  - ▪ **SAMTraining@gsa.gov or askSAM@gsa.gov**

► **Users who have any government roles can automatically view Entity Management – For Official Use Only (FOUO) data through search (similar to CCR Tools). You can view:**
  - **Data such as Taxpayer Identification Number**
  - **Entities that have opted out of SAM's public search**
  - **Intra-Governmental Transaction registrations**

► **Users who access SAM from a government IP address can also view FOUO data without a SAM account**

► **Users who are not accessing SAM from a government IP address will not automatically have access to FOUO-level data unless they have been granted a government role.**

► **If there are users who need access to FOUO level data who a.) will not be coming from a government IP address or b.) will not have a government role in SAM for this phase OR if the user needs a higher level of access beyond FOUO (i.e., sensitive) then they will need to request access via the Data Access Request process after creating a SAM account.**